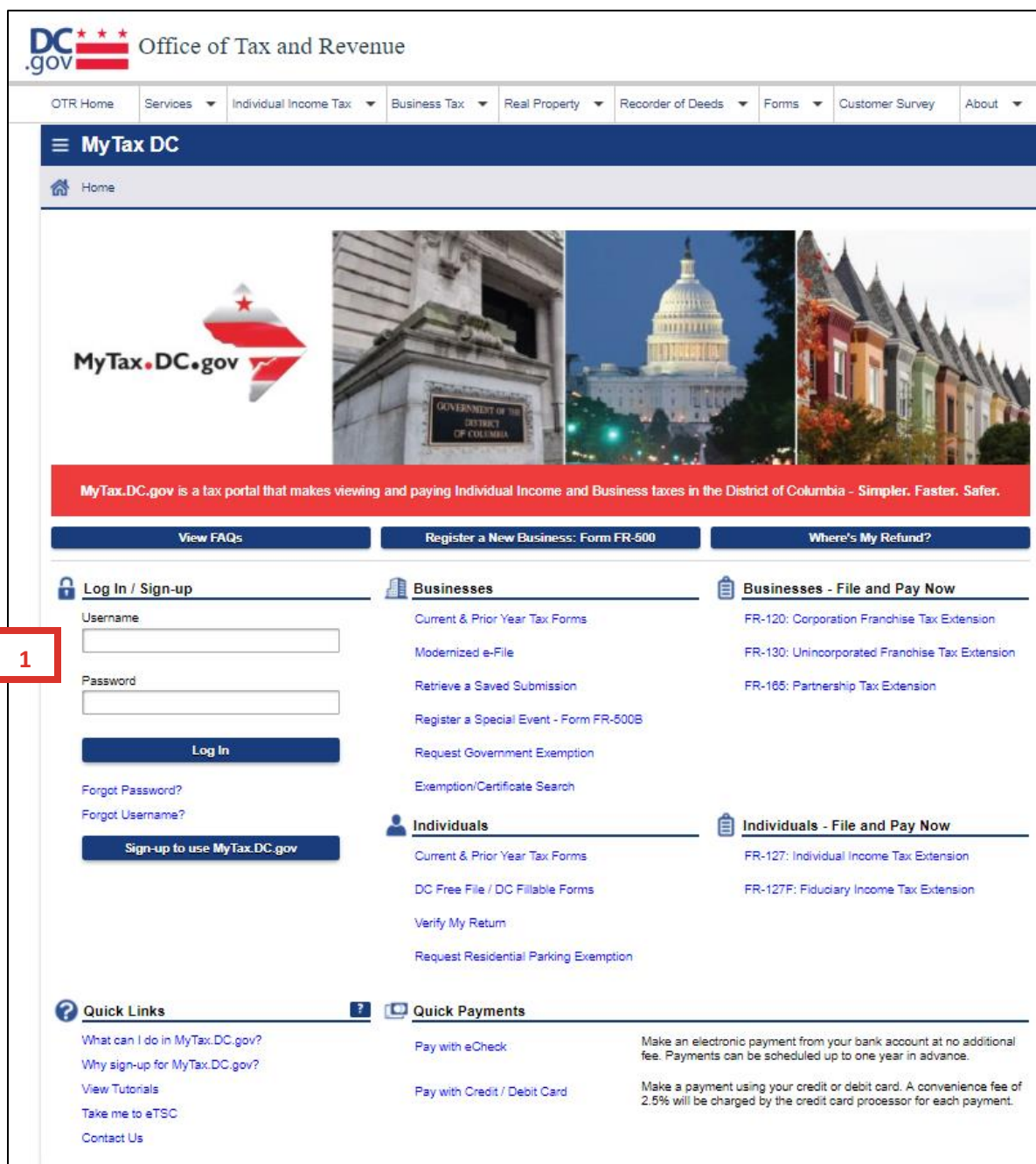


MyTax.DC.gov User Guide:

How to File an Estate Tax Return

Personal Representatives of an Estate can register to file an Estate Tax Return via [MyTax.DC.gov](https://mytax.dc.gov) by following this step-by-step guide.

Note: If do not have a [MyTax.DC.gov](https://mytax.dc.gov) account, you will need to complete the sign up process before you can register to gain access to a DC estate tax account and file an estate tax return. Please refer to the [“How to Sign for MyTax.DC.gov User Guide”](#) further instructions.



The screenshot shows the MyTax.DC.gov homepage. At the top is the DC.gov logo and 'Office of Tax and Revenue'. Below is a navigation bar with links: OTR Home, Services, Individual Income Tax, Business Tax, Real Property, Recorder of Deeds, Forms, Customer Survey, and About. The main header is 'MyTax DC' with a 'Home' link. Below the header is a banner with the MyTax.DC.gov logo and three images of DC landmarks. A red banner below the images states: 'MyTax.DC.gov is a tax portal that makes viewing and paying Individual Income and Business taxes in the District of Columbia - Simpler. Faster. Safer.' Below this are three buttons: 'View FAQs', 'Register a New Business: Form FR-500', and 'Where's My Refund?'. The main content area is divided into three columns. The first column is 'Log In / Sign-up' and contains a red box with the number 1, a 'Username' input field, a 'Password' input field, a 'Log In' button, and links for 'Forgot Password?' and 'Forgot Username?'. Below these is a 'Sign-up to use MyTax.DC.gov' button. The second column is 'Businesses' and contains links for 'Current & Prior Year Tax Forms', 'Modernized e-File', 'Retrieve a Saved Submission', 'Register a Special Event - Form FR-500B', 'Request Government Exemption', and 'Exemption/Certificate Search'. The third column is 'Businesses - File and Pay Now' and contains links for 'FR-120: Corporation Franchise Tax Extension', 'FR-130: Unincorporated Franchise Tax Extension', and 'FR-165: Partnership Tax Extension'. Below the 'Businesses' column is the 'Individuals' section with links for 'Current & Prior Year Tax Forms', 'DC Free File / DC Fillable Forms', 'Verify My Return', and 'Request Residential Parking Exemption'. To the right of the 'Individuals' section is the 'Individuals - File and Pay Now' section with links for 'FR-127: Individual Income Tax Extension' and 'FR-127F: Fiduciary Income Tax Extension'. At the bottom are two sections: 'Quick Links' with links for 'What can I do in MyTax.DC.gov?', 'Why sign-up for MyTax.DC.gov?', 'View Tutorials', 'Take me to eTSC', and 'Contact Us'; and 'Quick Payments' with links for 'Pay with eCheck' and 'Pay with Credit / Debit Card', each with a brief description of the payment method.

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.

DC.gov Office of Tax and Revenue

MyTax DC Welcome, Captain Hook Settings Log Off

Home

Ligon

Captain Hook
captain.hook1@dc.gov
+1 (202) 555-5555
Last logged on 27-Apr-2018
Balance: \$0.00

Alerts

There is 1 unread message

I Want To **2** More...

View My Web Profile
Send OTR a message
View FAQ's
Manage payments and returns
Go Paperless

Accounts Submissions Correspondence Names and Addresses Exemptions Logons

Accounts

Filter

You do not have access to any accounts

2. In the user profile, at the top right-hand corner, click **More** (next to **I Want To**).

DC.gov Office of Tax and Revenue

≡ I Want To Welcome, Peter Pan Settings Log Off

Home > I Want To

I Want To

- [View My Web Profile](#)
- [Send OTR a message](#)
- [View FAQ's](#)
- [Manage payments and returns](#)
- [Go Paperless](#)

Payment Agreement

- [Request Payment Agreement](#)
- [Update Payment Agreement Bank](#)

Other Activities

- [Update NAICS Code](#)
- [Request Third Party Access](#)
- [Register for DC Estate Tax Access](#)
- [Submit QHTC Certification](#)
- [Manage a Special Event](#)
- [Add/Update Contact](#)

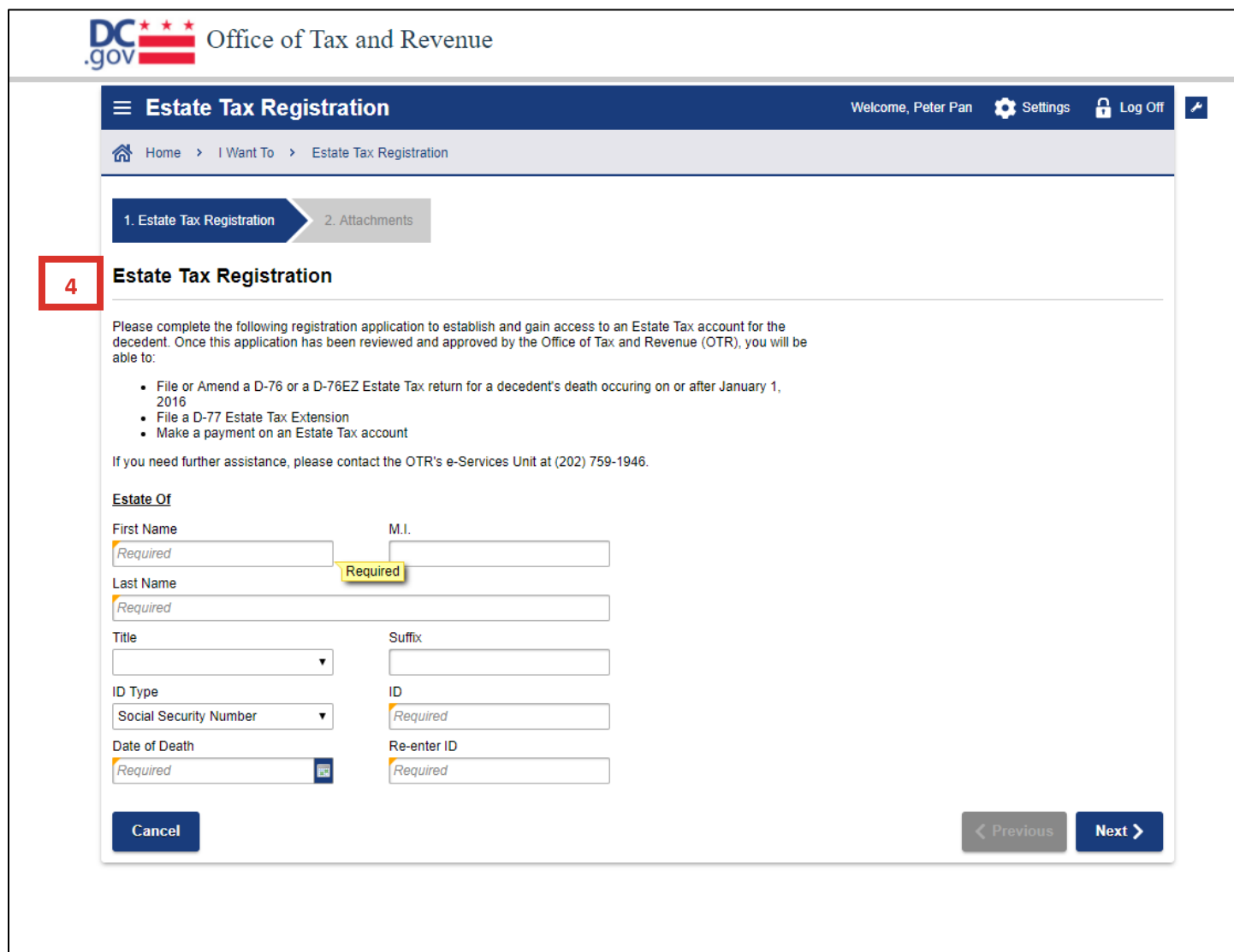
Request An Exemption

- [Request for Exemption To File \(FR-164\)](#)

Bulk Processing

- [Request Access to Bulk Filing](#) Withholding (FR900Q), Sales and Use (FR800M/Q/A) access

- Under the **Other Activities** section, click Register for **DC Estate Tax Access**.



DC .gov Office of Tax and Revenue

Estate Tax Registration Welcome, Peter Pan Settings Log Off

Home > I Want To > Estate Tax Registration

1. Estate Tax Registration 2. Attachments

4 Estate Tax Registration

Please complete the following registration application to establish and gain access to an Estate Tax account for the decedent. Once this application has been reviewed and approved by the Office of Tax and Revenue (OTR), you will be able to:


- File or Amend a D-76 or a D-76EZ Estate Tax return for a decedent's death occurring on or after January 1, 2016
- File a D-77 Estate Tax Extension
- Make a payment on an Estate Tax account

If you need further assistance, please contact the OTR's e-Services Unit at (202) 759-1946.

Estate Of

First Name M.I.
 Last Name
 Title Suffix
 ID Type ID
 Date of Death Re-enter ID
 Cancel Previous Next

4. In order to gain access to an Estate Tax account, you must complete the registration application on **Estate Tax Registration** page.
 - a. Enter the decedent's **First Name**, **Middle Initial** (if applicable), **Last Name**, **Title** and **Suffix** (if applicable).
 - b. From the **ID Type** down drop bar you can select **Social Security Number (SSN)** or **Individual Taxpayer ID Number (ITIN)**.
 - c. Enter the decedent's **ID** number in the required field and **Re-enter the ID**.
 - d. Select the decedent's **Date of Death**.
 - e. Click **Next**.


Office of Tax and Revenue

Estate Tax Registration
Welcome, Peter Pan
Settings
Log Off

Home > I Want To > Estate Tax Registration

1. Estate Tax Registration
2. Attachments

Attachments

The following documents are required to complete the estate tax registration and must be attached to your application.

- Death Certificate

In addition to the Death Certificate, please attach one of the following documents:

- Letters of Administration
- Will
- Trust Agreement
- Other documents identifying the Estate's beneficiaries and/or executor(s) of the estate

Non-Personal Representative Registrants:
In addition to the aforementioned documents, non-Personal Representatives must attach a Power of Attorney (POA).

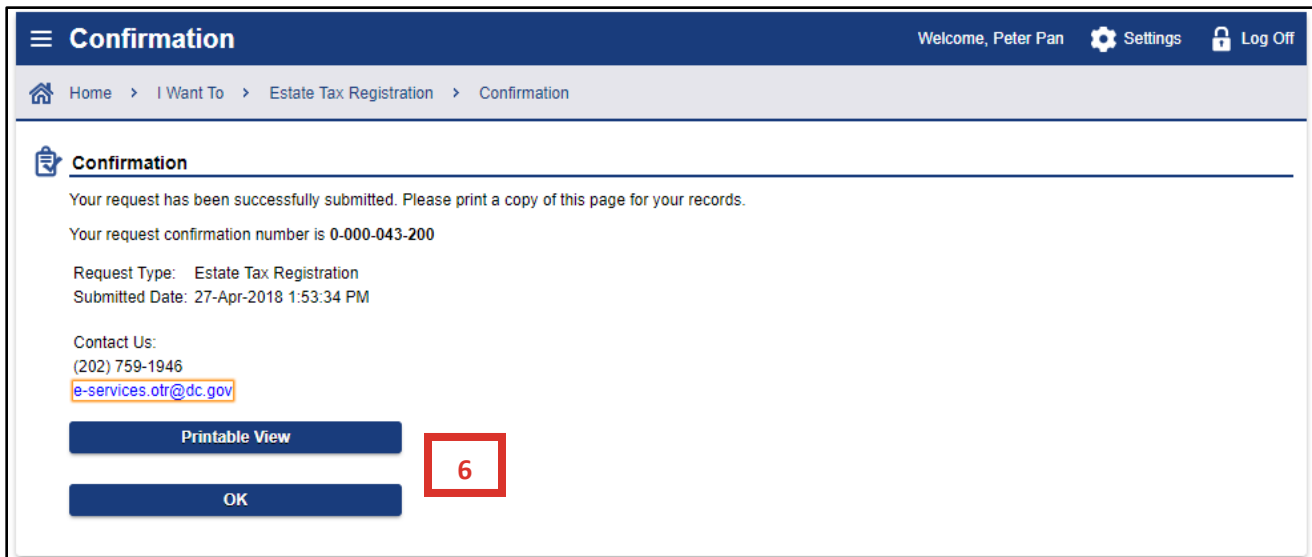
Attachment Count

Death Certificate is required

Attachments Add Attachment

Type	Name	Description	Size
<div> Cancel <div> Previous Submit </div> </div>			

5. On the **Attachments** page, attach the required documents (i.e. **Death Certificate, Letters of Administration**) to complete the estate tax registration application.
 - a. Click the **Add Attachment** button to upload the required documents.
 - b. Click **Submit** once all the required documents have been attached.



Confirmation

Welcome, Peter Pan [Settings](#) [Log Off](#)

Home > I Want To > Estate Tax Registration > Confirmation

Confirmation

Your request has been successfully submitted. Please print a copy of this page for your records.

Your request confirmation number is 0-000-043-200

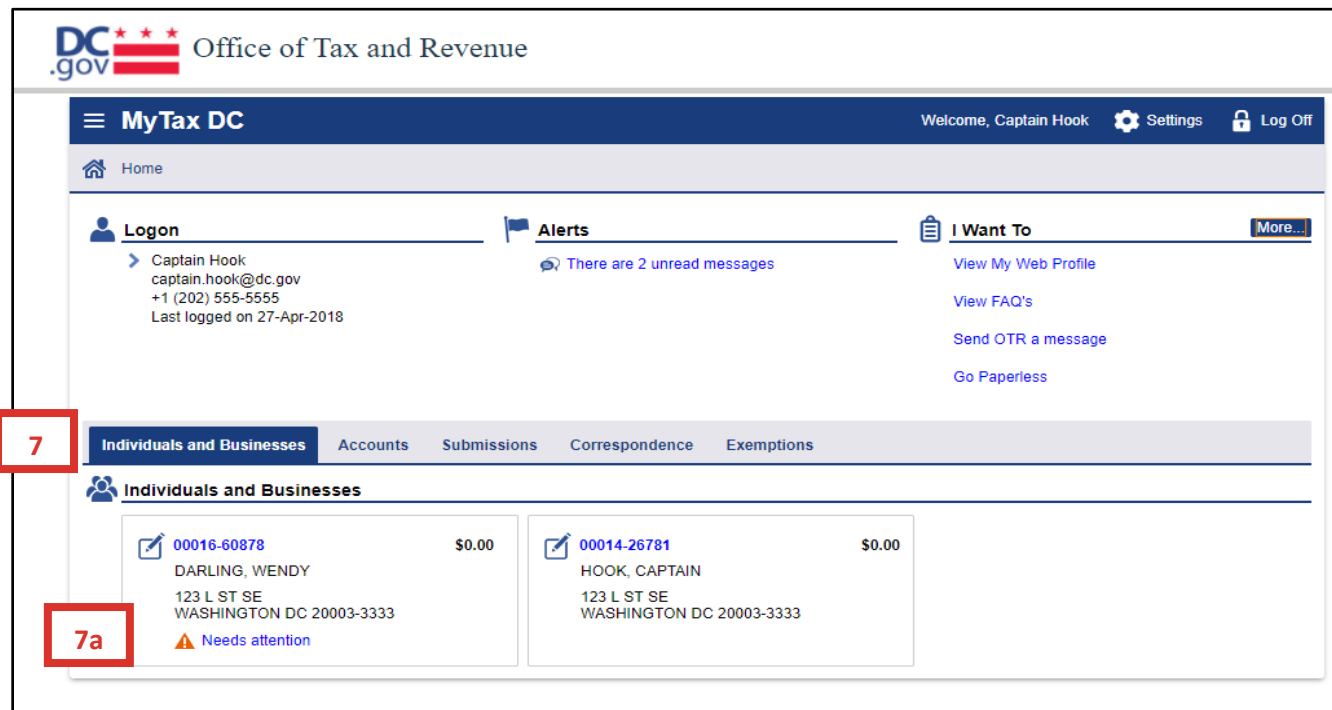
Request Type: Estate Tax Registration
Submitted Date: 27-Apr-2018 1:53:34 PM

Contact Us:
(202) 759-1946
e-services.otr@dc.gov

[Printable View](#) [OK](#)

6. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.

Note: OTR will review and process your application. If your application is approved, you will receive a notification alerting you of your access to the estate tax account. If your application is denied, you will also receive a notification, and you will need to complete the estate tax registration application process again with the correct documentation.



DC.gov Office of Tax and Revenue

MyTax DC Welcome, Captain Hook [Settings](#) [Log Off](#)

Home

Login **Alerts** **I Want To** [More...](#)

Captain Hook
captain.hook@dc.gov
+1 (202) 555-5555
Last logged on 27-Apr-2018

There are 2 unread messages

[View My Web Profile](#)
[View FAQ's](#)
[Send OTR a message](#)
[Go Paperless](#)

7 **Individuals and Businesses** Accounts Submissions Correspondence Exemptions

Individuals and Businesses

7a **00016-60878** \$0.00
DARLING, WENDY
123 L ST SE
WASHINGTON DC 20003-3333
Needs attention

00014-26781 \$0.00
HOOK, CAPTAIN
123 L ST SE
WASHINGTON DC 20003-3333

7. Once OTR approves your application, when you log in to your [MyTax.DC.gov](https://mytax.dc.gov) profile, you will see that you have access to the estate tax account under the **Individuals and Businesses** tab.

a. Any time special attention is needed for the estate tax account, you will notice an orange hazard sign accompanied by "Needs Attention." In this case it is to file the Estate tax return. Click on the box to go to the next screen.

Estate Tax Welcome, hook Settings Log Off

Home > DARLING, WENDY > Estate Tax

Account **Account Alerts** **I Want To** More...

DARLING, WENDY
00016-60878

Estate Tax
151-001986076
Balance: \$0.00

File return for 01-Apr-2018

Make a payment
Manage payments and returns
Request a Penalty Waiver

8 Periods Submissions Correspondence Names and Addresses

Periods View Periods

Period	Balance	Multiple Returns	Action
01-Apr-2018	\$0.00	Multiple Returns	File Return

- Under the **Periods** tab click **File Return**. **Note:** You can also click **File return for** a [specific period] under **Account Alerts**.

Returns Welcome, hook Settings Log Off

Home > DARLING, WENDY > Estate Tax > Returns

Returns for 01-Apr-2018 Filter

Received Date	Due Date	Return	Status
		D-77 Extension Voucher	
		Estate Tax Return	

2 Rows


- Click the **File Now** hyperlink to file the Estate Tax Return.

D-76 Estate Tax Return
Welcome, hook
Settings
Log Off

Home > DARLING, WENDY > Estate Tax > Returns > D-76 Estate Tax Return

1. D-76 Estate Tax Return

D-76 Estate Tax Return


Government of the District of Columbia

D-76
Estate Tax

10

[View Form Instructions](#)

DARLING, WENDY
Account ID: 151-001986076

Due Date: 2/1/2019
Tax Period Ending: 4/1/2018

10a

Who should file the D-76?

For a decedent whose death occurs on or after January 1, 2003 through December 31, 2016, the unified credit is \$345,800 and a DC Estate Tax return is not required to be filed if the decedent's gross estate does not exceed \$1,000,000. For a decedent whose death occurs after December 31, 2016, the unified credit is \$745,800 and a DC Estate Tax return is not required to be filed if the decedent's gross estate does not exceed \$2,000,000.

Date of Birth

Date of Death

Are you authorizing an individual to discuss this return with OTR?

(1) Will the Estate be passed to the surviving spouse or registered domestic partner resulting in "\$0" Taxable Estate?

(2) Will the Estate be donated to a charitable, public or tax-exempt organization under Section 501(c) of the IRC resulting in "\$0" Taxable Estate?

(3) Does some combination of (1) and (2) result in "\$0" Taxable Estate?

(4) Have you previously filed an extension and payment for this estate?

Please select one of the following options for **Return Type**:

- Select **Resident Return Type**, if you are a U.S. citizen
- Select **Non-resident Return Type**, if you are a Green Card holder
- Select **Alien Return Type**, if you are not a U.S. citizen or not a Green Card holder

Did the decedent die testate (is there a Will)?

Was the Estate Probated?

Are you appointed as the personal representative for this estate?

Cancel

10b

< Previous

Next >

10. The D-76 Estate Tax Return will appear. **Note:** Depending on how you answer the questions, you will either file the D-76 or the D-76EZ. The filing process remains the same for each return.
- Answer the required questions on the return.
 - Once completed click **Next**.

D-76 Estate Tax Return Welcome, krish Settings Log Off

Home DARLING, WENDY Estate Tax Returns D-76 Estate Tax Return

1. D-76 Estate Tax Return 2. Personal Representative

11 Personal Representative

Name KRISH Address 1101 4TH ST SW

ID Type Federal Employer ID Number Street 2 Unit Type Unit Number

ID **-***3123 WASHINGTON

Confirm ID **-***3123 DC - DISTRICT OF COLUMBIA

Phone Cell Phone (703) 515-1515 20024-0000 USA

Validate 11a

Cancel < Previous Next >

11. As the **Personal Representative** of the Estate, complete the following with your contact information.

- a. Once completed click **Next**.

D-76 Estate Tax Return Welcome, krish Settings Log Off

Home DARLING, WENDY Estate Tax Returns D-76 Estate Tax Return

1. D-76 Estate Tax Return 2. Personal Representative 3. Gross Estate

12 Gross Estate

Gross Estate Recapitulation

Item No.	Gross Estate	Check Box if Alternate Value	Value at Date of Death
1.	Schedule A - Real Estate	<input type="checkbox"/>	\$5,000,000
2.	Schedule B - Stocks and Bonds	<input type="checkbox"/>	\$0
3.	Schedule C - Mortgages, Notes, and Cash	<input type="checkbox"/>	\$0
4.	Schedule D - Insurance on the Decedent's Life (attach federal Form(s) 712)	<input type="checkbox"/>	\$0
5.	Schedule E - Jointly Owned Property (attach fed Form(s) 712 for life insurance)	<input type="checkbox"/>	\$0
6.	Schedule F - Other Miscellaneous Property (att. fed Form(s) 712 for life insurance)	<input type="checkbox"/>	\$0
7.	Schedule G - Transfers During Decedent's Life (att. fed Form(s) 712 for life insurance)	<input type="checkbox"/>	\$0
8.	Schedule H - Powers of Appointment	<input type="checkbox"/>	\$0
9.	Schedule I - Annuities	<input type="checkbox"/>	\$0
10.	Estimated value of assets subject to the special rule of Reg. section 20.2010-2T(a)(7)(ii)	<input type="checkbox"/>	\$0
11.	Total gross estate (add items 1 through 10)	<input type="checkbox"/>	\$5,000,000
12.	Schedule U - Qualified Conservation Easement Exclusion	<input type="checkbox"/>	\$0
13.	Total gross estate less exclusion (subtract item 12 from item 11)	<input type="checkbox"/>	\$5,000,000

Cancel < Previous Next > 12a

12. Enter the values for the **Gross Estate** page.

- a. Click **Next**.

D-76 Estate Tax Return
Welcome, krish
Settings
Log Off

Home > DARLING, WENDY > Estate Tax > Returns > D-76 Estate Tax Return

1. D-76 Estate Tax Return
2. Personal Representative
3. Gross Estate
4. Deductions

Deductions

Deductions Recapitulation

Item No.	Deductions	Amount
14.	Schedule J - Funeral Expenses and Expenses Incurred in Administering Property Subject to Claims	\$25,000 ×
15.	Schedule K - Debts of the Decedent	\$0
16.	Schedule K - Mortgages and Liens	\$0
17.	Total of items 14 through 16	\$25,000
18.	Allowable amount of deductions from item 17	\$2,500
19.	Schedule L - Net Losses During Administration	\$0
20.	Schedule L - Expenses Incurred in Administering Property Not Subject to Claims	\$0
21.	Schedule M - Bequests, etc., to Surviving Spouse	\$0
22.	Schedule O - Charitable, Public, and Similar Gifts and Bequests	\$0
23.	Estimated value of deductible assets subject to the special rule of Reg. section 20.2010-2T(a)(7)(ii)	\$0
24.	Tentative total allowable deductions (add items 18 through 23)	\$2,500

Cancel
Previous
Next

13. Enter the **Amount** for the **Deductions** page.

a. Click **Next**.

D-76 Estate Tax Return
Welcome, krish
Settings
Log Off

Home > DARLING, WENDY > Estate Tax > Returns > D-76 Estate Tax Return

1. D-76 Estate Tax Return
2. Personal Representative
3. Gross Estate
4. Deductions
5. D-76

D-76

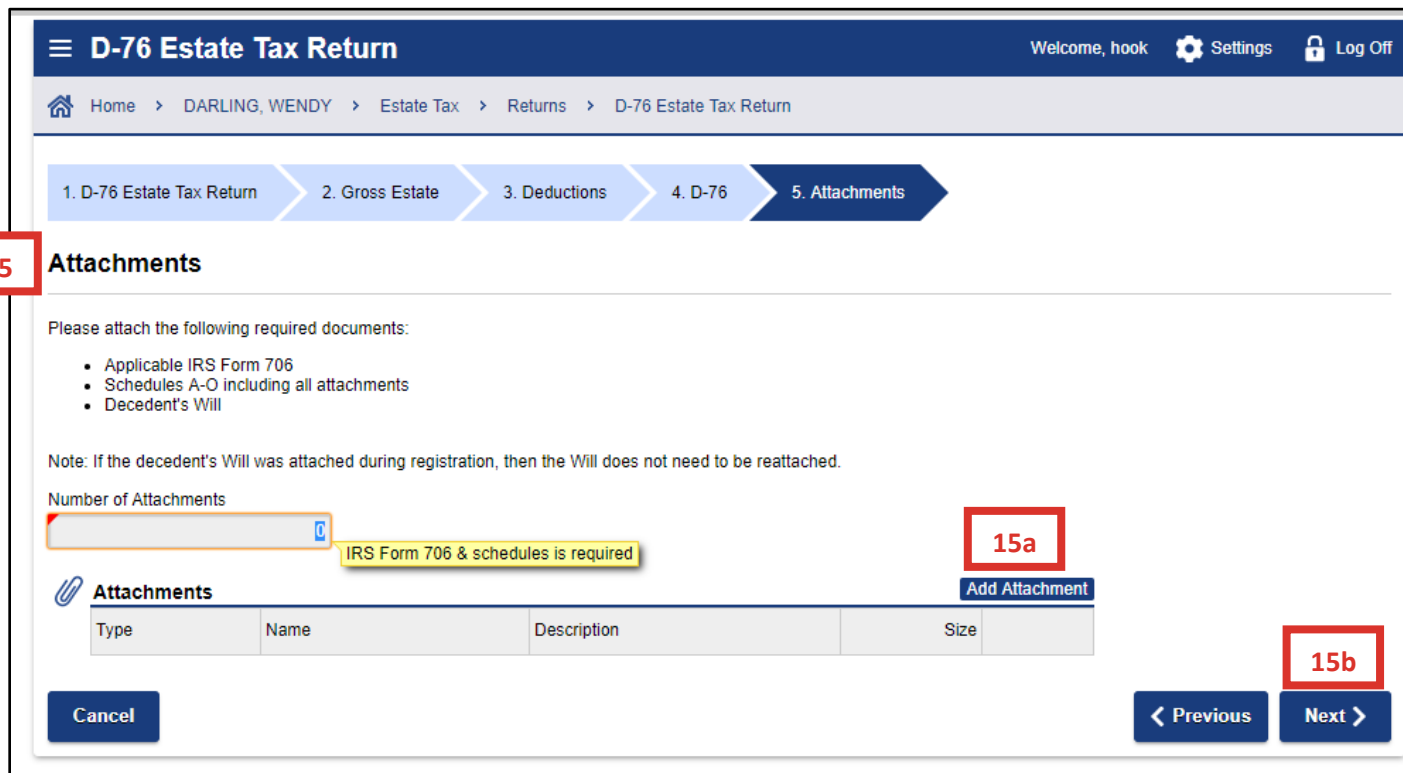
Estate Information

1.	Gross value of Property located in DC	\$500,000 ×
2.	Total Gross Estate	\$5,000,000
3.	Total Allowable Deductions	\$2,500
4.	Tentative Taxable Estate	\$4,997,500
5.	DC Estate Tax Due	\$29,572
6.	Payment with Extension Paid On:	\$0
7.	Overpayment	\$0
Will the refund request go to an account outside of the US? <input type="radio"/> Yes <input type="radio"/> No		
8.	Balance Due	\$29,572

Cancel
Previous
Next

14. Enter the values for the **Estate Information** page.

a. Click **Next**.



15 Attachments

Please attach the following required documents:

- Applicable IRS Form 706
- Schedules A-O including all attachments
- Decedent's Will

Note: If the decedent's Will was attached during registration, then the Will does not need to be reattached.

Number of Attachments

IRS Form 706 & schedules is required

15a

Attachments

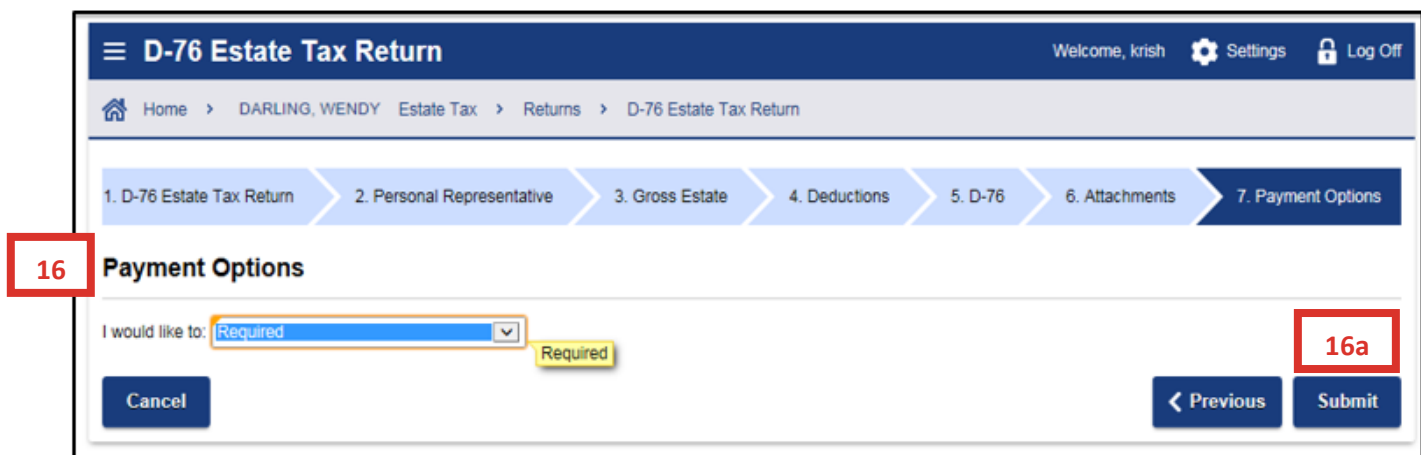
Type	Name	Description	Size
------	------	-------------	------

15b

Add Attachment

Cancel **< Previous** **Next >**

15. On the Attachments page, attach all required documents needed to file the Estate Tax return (i.e. IRS Form 706).
- Click the **Add Attachment** button to upload the required documents.
 - Click **Next** once all the required documents have been attached.



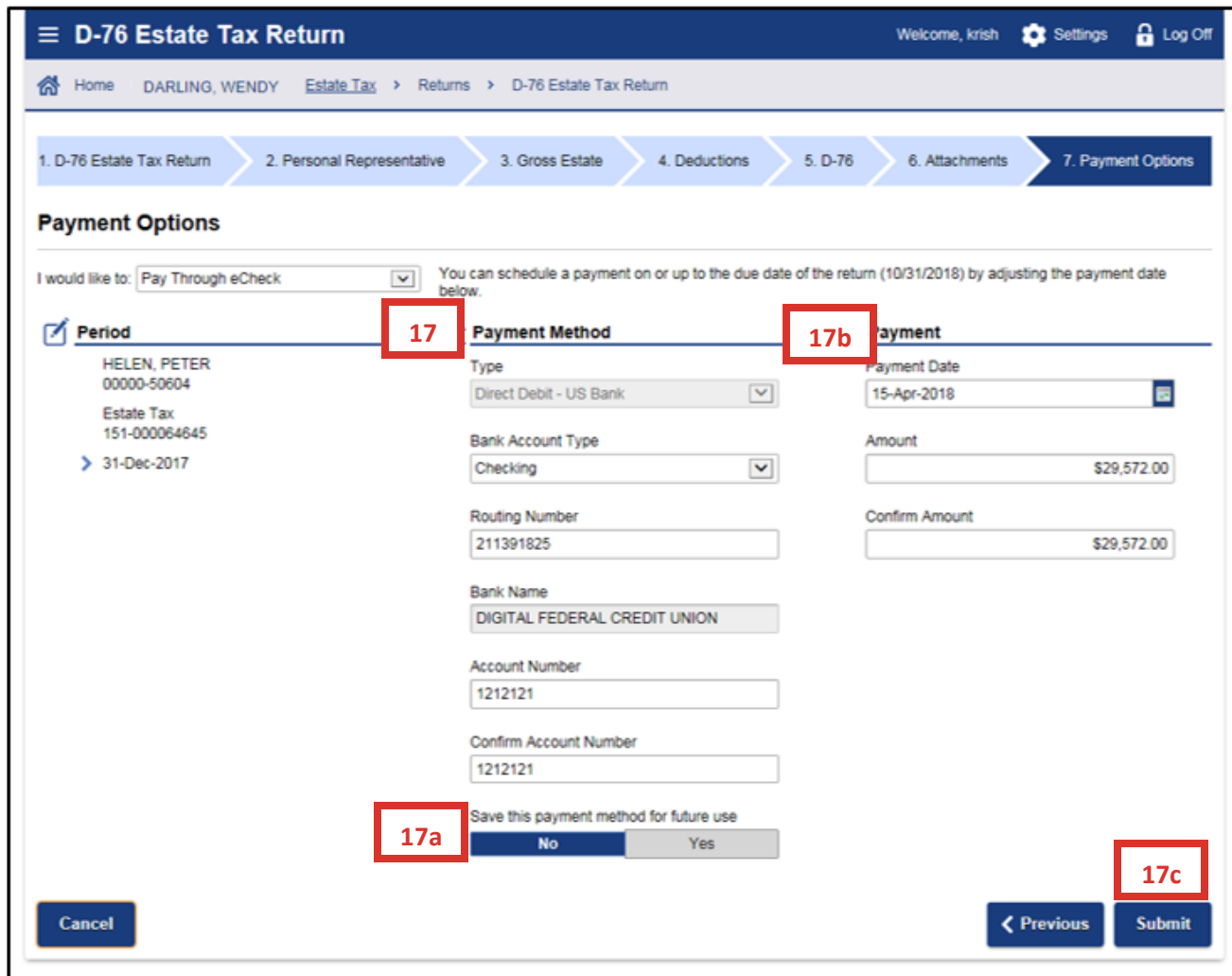
16 Payment Options

I would like to:

16a

Cancel **< Previous** **Submit**

16. Select the appropriate **Payment Options** from the drop-down bar. You may choose **No Payment is Needed** when you are filing a zero return. The option **Pay Later** allows you to schedule your payment up to one year in advance. For this example, we will choose to **Pay by eCheck**.
- Click **Submit**.



D-76 Estate Tax Return Welcome, krish Settings Log Off

Home DARLING, WENDY Estate Tax Returns D-76 Estate Tax Return

1. D-76 Estate Tax Return 2. Personal Representative 3. Gross Estate 4. Deductions 5. D-76 6. Attachments 7. Payment Options

Payment Options

I would like to: Pay Through eCheck You can schedule a payment on or up to the due date of the return (10/31/2018) by adjusting the payment date below.

Period	Payment Method	Payment
<p>HELEN, PETER 00000-50604</p> <p>Estate Tax 151-000064645</p> <p>> 31-Dec-2017</p>	<p>Type Direct Debit - US Bank</p> <p>Bank Account Type Checking</p> <p>Routing Number 211391825</p> <p>Bank Name DIGITAL FEDERAL CREDIT UNION</p> <p>Account Number 1212121</p> <p>Confirm Account Number 1212121</p>	<p>Payment Date 15-Apr-2018</p> <p>Amount \$29,572.00</p> <p>Confirm Amount \$29,572.00</p>

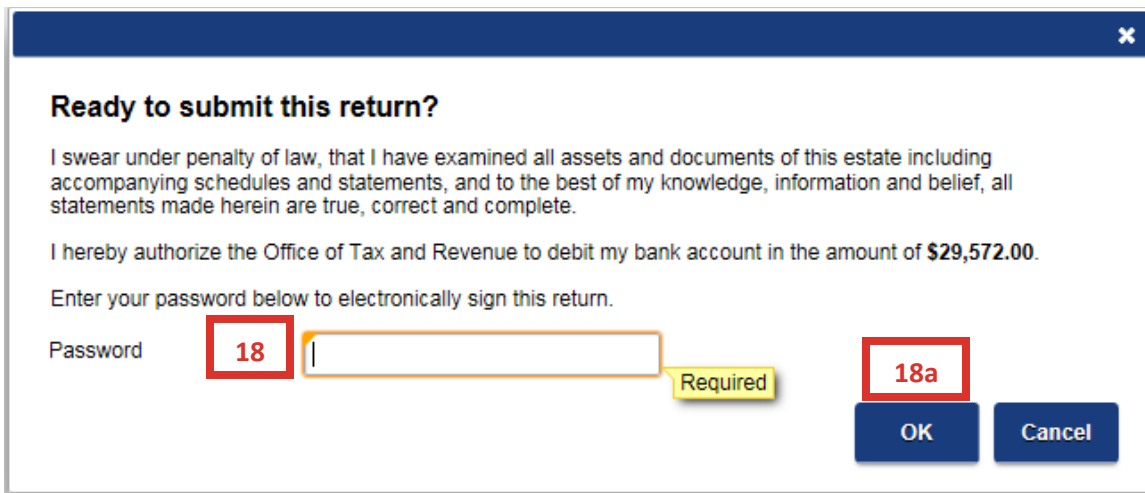
Save this payment method for future use

No Yes

Cancel < Previous Submit

17. Enter your bank account information into the **Payment Method** section including **Bank Account Type**, **Routing Number**, and **Account Number**. Confirm your **Account Number**.

- If you would like [MyTax.DC.gov](https://mytax.dc.gov) to store your bank account information, click **Yes** beneath **Save this payment method for future use**. For this example, we selected **No**.
- In the **Payment** section, choose a **Payment Date**. When paying with an eCheck, you can choose a future payment date up to the due date of the return (see the top of the page). Enter the **Amount** of your payment and **Confirm** that amount.
- Click **Submit**.



Ready to submit this return?

I swear under penalty of law, that I have examined all assets and documents of this estate including accompanying schedules and statements, and to the best of my knowledge, information and belief, all statements made herein are true, correct and complete.

I hereby authorize the Office of Tax and Revenue to debit my bank account in the amount of **\$29,572.00**.

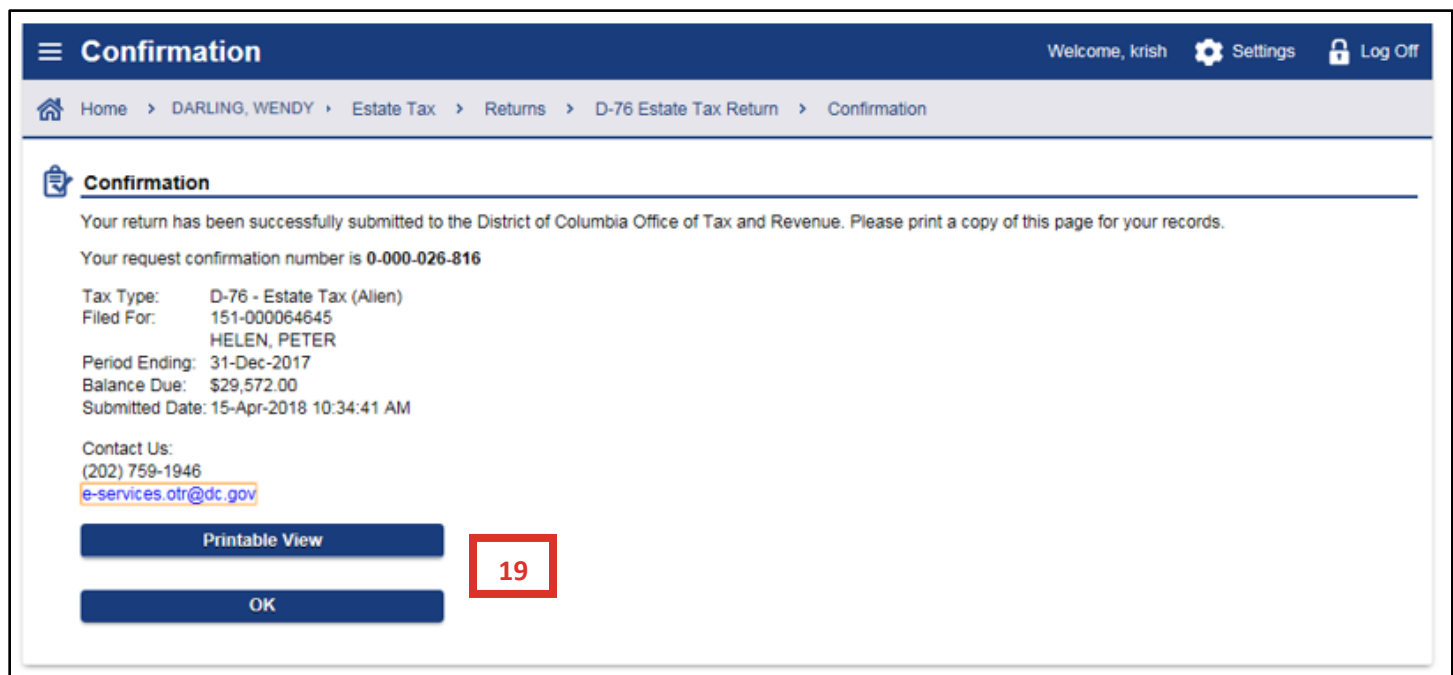
Enter your password below to electronically sign this return.



Password **18** **Required** **18a**

OK **Cancel**


18. In the **Ready to submit this return?** pop-up window, enter your [MyTax.DC.gov](https://mytax.dc.gov) Password, which will act as your electronic signature.

a. Click **OK**.



Confirmation Welcome, krish  Settings  Log Off

Home > DARLING, WENDY > Estate Tax > Returns > D-76 Estate Tax Return > Confirmation

 **Confirmation**

Your return has been successfully submitted to the District of Columbia Office of Tax and Revenue. Please print a copy of this page for your records.

Your request confirmation number is **0-000-026-816**

Tax Type: D-76 - Estate Tax (Alien)
Filed For: 151-000064645
HELEN, PETER
Period Ending: 31-Dec-2017
Balance Due: \$29,572.00
Submitted Date: 15-Apr-2018 10:34:41 AM

Contact Us:
(202) 759-1946
e-services.otr@dc.gov

Printable View **19**

OK

19. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.